

# Raising visibility and eliminating manual tasks for asset management firm



Industry: Financial Services



## Challenge

A global asset management firm struggled to remain competitive in an aggressive market due to process inefficiencies and disjointed legacy technologies. Core functions to their business, including investment management, deal progress tracking, and document maintenance, relied on data spread across multiple systems.

Employees manually completed work critical to supporting investment decisions, leading to errors and decreased productivity. These inefficiencies limited the firm's ability to track precise metrics and report on investment returns.

## Solution

The firm partnered with Macedon Technologies to create a light-weight, flexible Appian system that would eliminate manual task tracking, reduce analyst hours spent on deal management, and serve as a centralized reporting tool for decision-makers. Collaborating with business and IT leaders, the Macedon team created an application that enables consistent deal tracking and automated status communication while providing role-based access. The application connected the firm's multiple pre-existing data sources to present real-time deal and security information in a single unified location.

*"Macedon's developers are highly skilled, diligent, and efficient...They jump in and absorb our processes quickly...We wouldn't be where we are with Appian today if we didn't have the great partnership of Macedon."*

— Senior Manager

## Solution Continued

With all the crucial investment and deal information accessible through a single hub, employees no longer had to key in details into multiple systems, increasing the velocity of deal-related processes.

Macedon's solution introduced context-driven dashboards to increase visibility for team members. These dashboards highlighted critical deal information, enabling analysts to take action on high-priority deals instantly. Open action items and key performance indicators rounded out the dashboard for a holistic view of the investment lifecycle. To further improve productivity and drive awareness, the system sent timely notifications and reminders to users to complete urgent action items.

## Result

By improving the user experience to capture deal information and reconciling the firm's data sources into a single source of truth, Macedon's solution improves reporting, organizational communication, and overall productivity. The application's unified data hub enhances stakeholders' visibility into business operations throughout the investment lifecycle. As analysts move away from manual and redundant work, they are free to perform more valuable tasks.

## From disjointed and noncompetitive to digital and productive



Greater Visibility



Automated



Real-time Reporting



Unified Data



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## About Macedon Technologies

Macedon is a recognized leader in intelligent automation solutions. We have deep expertise with industry-leading technologies that we leverage to solve our clients' unique challenges.

Our hybrid roles achieve better solutions faster than traditional development teams.